# ARIES Training Tips & Helpful Hints

## ARIES General:

| Training Tip / Helpful Hint: | Notes: |
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| **Basics before you start ARIES** | |
| To successfully login to ARIES, you must have **JavaScript and cookies enabled**. Failure to do so will result in error messages upon ARIES login. If you are receiving error messages when trying to login to ARIES on your first attempt, you need follow these steps:<br><br>Enabling Java Script and Cookies:<br>1. Start Internet Explorer by double clicking on your "Explorer" icon or by clicking on "Start," "Programs," then select "Internet Explorer."<br>2. Next select "Tools," then "Internet Options."<br>3. To enable Java Script, click on the "Security" Tab.<br>4. Click on the "Custom Level" button. A window will appear called "Security Settings." Scroll down (near the end) to "Scripting," "Active Scripting." Click on "Enable." Next click "OK."<br>5. To enable cookies, click on the "Privacy" Tab. Make sure the scroll bar on left side is set to "**Medium**."<br>6. Click on "Apply."<br>7. Click on "OK. " | |
| You will also need to **enable pop-ups** in order to access and use the ARIES Help Manual. To do this, follow these steps:<br>1. Start Internet Explorer by double clicking on your "Explorer" icon or by clicking on "Start," "Programs," then select "Internet Explorer."<br>2. Next, select "Tools," then "Internet Options."<br>3. Click on the "Privacy" Tab.<br>4. At the bottom of the screen there is a section titled "Pop-Up Blocker." Select the "Settings" button.<br>5. Another window will appear entitled "Pop-Up Blocker Settings." In the field called "Address of Web site to allow," type in the ARIES web site: https://ARIES.dhs.ca.gov<br>6. Click on "Add."<br>7. Click on "Close."<br>8. Click on "Apply."<br>9. Click on "OK." | |

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| **Login ID** must be a minimum of 7 characters.<br><br>**Passwords** must be a minimum of 6 characters and must include: at least one a capital letter, at least one number and the rest can be lower case letters.<br>Users may change their own passwords by selecting ‘My Profile’ from the ARIES home page. | |
| **ARIES has two time outs**.<br><br>1) Authentication: When you log in to ARIES, you "authenticate" yourself -- you prove who you are with your user name, password, and certificate. Your authentication expires if you don't do something within the timeout period (default 15 minutes). You must click on one of the tabs or menus or buttons within the timeout period. If you are creating or editing a record, typing on the screen or using the dropdowns does <u>not</u> count -- you must either save or cancel the record before the timeout. If the timeout expires, you must "re-authenticate" yourself to ARIES -- meaning that you must log in again. If you log in again before the end of the Session timeout (see below), you will end up right back where you were, and if you were creating or editing a record, the data you entered but did not save, will still be on the screen (but still not saved).<br><br>2) Session: When you log on to ARIES, a "session" is created on the server. Internet software always involves two "sessions" -- the one on your PC (your browser) and the one on the server (ARIES) -- and the two sessions exchange data whenever you click on something (server sends you data to view/edit, you send the server new data to save, etc). There is a separate session on the server for every user logged in to ARIES, and each session uses up resources on the server. If a session remains inactive for the timeout period (default of 30 minutes), ARIES will close the session to free up resources for other users. When a session is closed, if you were in the middle of creating or editing a record, any data you entered on the screen will be lost | |
| **ARIES has a lock-out feature**. The system will prevent you from entering if you attempt to enter the incorrect password three times. You will then need to contact your system administrator to re-set your password. | |
| **General ARIES Training Tips** | |
| **A user can set their home page** to the service line item screen so that when they log into ARIES, the service line item screen is the first they see. There are a few other options for setting the home page. They are “Client Search,” “New Service,” “Staff Search,” “Agency Search,” “Appointment,” and the “Welcome Page.” | |

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| To set your home page, go to the ARIES home page and select the **“My Profile”** button. Next, click on the “Edit” button (right side) and select your home page site from the pick list in the “Home Page” field. Lastly, click on the “Save” button. | |
| When navigating in ARIES, ***always*** use the **back button on the ARIES black menu/navigation bar** – ***never*** use the green back button on your Internet Explorer (IE) browser menu/navigation bar. If you are in ARIES and the screen you are on does not have the black bar with the ARIES “Back” button (the black bar disappears on the edit screens), there are buttons at the bottom of the screen that you can click on to exit such as “Cancel” and/or “Save and Next.”<br><br>If you are in “edit” mode and you click the IE “back” button, the record you are editing will remain locked; this means that other users cannot access this edit screen for this client. To prevent locking records, always use the “Save” buttons or “Cancel” button if the ARIES “Back” button is not visible. | |
| In ARIES, when **using pick lists** (fields with drop down options), if you type in the first letter of the word you are trying to enter, the word may not appear. In fact, another word beginning with the same letter may appear first. If you cannot get the word to appear, you must use the mouse to select from drop down list. Unfortunately, with Internet systems, you cannot always simply type in the word to capture the data. Sometimes you have to use the mouse.<br><br>The other option would be to type in the first letter of the word you are trying to enter and then use the up and down arrow keys to scroll through the pick list. Once you have the correct entry highlighted in the data field, hit the tab key to capture the data element and move to the next field. | |
| When entering data, be aware that the **cursor automatically starts out in the first open field on each** page. This is more conducive to those who enter data by tabbing through fields rather than using the scroll wheel on the mouse (if your mouse has one). If the first field on the screen happens to be a dropdown list and you use the scroll wheel to move down the page, you actually scroll through the options in that first dropdown. The “clue” is that if you use the scroll wheel and the page doesn’t scroll down, you probably just changed the data in the first field by mistake. The only way around this is to click on a **blank** area of the page before using the scroll wheel. If you prefer to use the keyboard and do not use the mouse a lot, this will not affect you. If you use the mouse a lot and like to use the scroll wheel, be careful. Using the scroll bar on the side of the screen is a safer way to go. This issue is common in using web applications. | |
| When **entering money fields, do not enter the dollar sign.** However, when **entering dates, phone, or social security number you must enter a forward-slash “/“ or a hyphen “-”** | |

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| • **"Save" and "Save and Next,"** are yellow buttons; these buttons save your data. Clicking on "Save" will save your data. Clicking on "Save and Next" will save your data and take you to the next sub tab's "edit screen" in ARIES.<br>• **"Save and Done"** is a blue button. Clicking on "Save and Done" will save your data and bring you back out to the ARIES read-only screens.<br>• **"Edit"** is a blue button that allows you to edit client information in the client's record.<br>• **"New"** is a blue button that allows you to add new information in the client's record.<br>• **"Cancel"** is a blue button that allows you to cancel your action and not save the information you entered.<br>• **"Deactivate"** is a red button that allows you to take the client information off the ARIES screen or hides it from the general user but ARIES still records the deactivated record in the database.<br>• Only users with permissions to edit, create and/or delete will see these buttons. | |
| Occasionally, the **column headings** will disappear as you scroll down the screen. You may have to scroll up to see the column headings. Internet software does not allow locking down column headings. | |
| If you see a **<u>large</u> red asterisk "*"** next to a field, it means it is required for the Health Resources and Services Administration's (HRSA) CARE Act Data Report (CADR). These asterisk-marked fields are required for all providers. | |
| If you see a **<u>small</u> red asterisk "*"** next to a field, it means that the data you entered is invalid for that field or you left a forced field blank. Look for a message explaining that error at the top of the page. | |
| There are not many **forced fields** in ARIES. Occasionally, however, you will be forced to enter a field before you leave a screen. ARIES will prompt you as to which field needs to be filled out. | |
| You can change the information on a screen, but until you hit **"Save," "Save and Next" or "Save and Done,"** ARIES will not save the edits. ARIES does not work like Access where it automatically saves when you move from field to field or screen to screen. | |
| Each sub tab has a **read-only screen and a corresponding edit screen**. Read-only screens display information contained in the subsequent subtabs. Edit screens are where users add or edit client data.<br><br>The "Edit" buttons on the read-only screens are only available to those with the appropriate permission levels. | |

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| To access the **help manual click on the F1 button** from any screen.  The help manual will automatically pop up to the place where you are at in ARIES.  For example, if you need assistance with the Medical History edit screen, if you click on the F1 button, the manual will open to the Medical History section.  You can also click on the little "books" that appear with the manual's chapters on the left side of the Help Manual's pop-up window.  Clicking on the books will expand and display each Chapter's Sections. | |

## Client Search:

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| Each agency will have their own signed Office of AIDS (OA) "**Consent to Share" form** at their agency; even if the client already signed an agreement to share data at another agency. | |
| Once a client goes from **non-share to a share**, all of his/her data elements will be shared, with the exception of certain types of case notes.  These non-shared case notes are: legal, substance abuse, mental health and incident reports. | |
| Client data is available to be shared, but it is not really shared until the client goes to the next agency and gives them the **"keys" to unlock his/her data**.  The keys are: first name, middle initial, last name, date of birth, gender, and mother's maiden name.  These variables are used to generate clients' unique record numbers (URN). | |
| If the client chooses to be a **non-share client**, only your agency can see the data that your agency collected and entered on this particular client. | |
| To **search for an affected/related client**, check the check box labeled "Search Related/Affected Individuals."  If the affected/related person you are looking for is in the system, by checking this box, ARIES will take you to that client and will display the same screens as a primary client.  You can also find and/or add an affected/related client by searching or going to the primary client's record, click on the Demographic tab, Living Situation sub-tab and go to the "Related or Affected Individuals" section.  Here you can either add new related or affected clients or you can click on the related/affected clients name (if already in ARIES) to open up his or her particular record. | |
| **When adding a new client, make sure your first search range is broad**. If you fill out all client identifying fields completely, you are limiting the search (due to possible spelling mistakes/incorrect entries).  The first ARIES client search will search your agency.  If no match is found, type additional client identifiers for a more specific match as ARIES will search the entire system for a match. | |

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| When adding a new client, if you've searched with more specific client information (see issue above) and if ARIES does not find a match, then you need to create a new client by clicking on the **"Create New Client"** button. You will be taken to the "New Client" screen. This screen contains required URN key variables; you must complete all data elements on this screen to create a new client. Once you complete all data fields, click "Search" to do one more search of ARIES. If client still does not exist, then ARIES will leave you on the New Client screen and it will prompt you to tab through each field. Before clicking the "Create" button, if the client agrees to share data, make sure you select the "Client Agrees to Share Data" checkbox. Lastly, to create your new client in ARIES, click the "Create" button. | |

## ARIES Appointments:

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| You can make an appointment by clicking on the **"New Appointment" button** on the client contact read-only information screen. You can also search by appointment or by program on the appropriate search screen. This is the only way the client and appointment screens are linked. | |
| The **appointment screen** does not link to other agencies nor does it link to Outlook. However, you can create a report to export appointments in a format that Microsoft Outlook will accept. | |
| You can look at the appointments within your agency and **run a report** on which clients you are seeing that day. | |

## ARIES Client:

## Demographics Tab

| **Contact Info Sub tab** | |
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| The default **for phone calls, messages, mail and e-mail are all set to "NO"** to maximize client confidentiality. All users must answer each field according to the client's actual responses to these items. In other words, users should not save the record without reviewing and accurately answering each field. | |
| If you check the checkbox labeled **"Same as Residence"** (under mailing), ARIES will fill in the mailing address with the client's residence address. | |

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| **Demographic Detail Sub tab** | |
| **For CAREWare and Carebase conversions, we assumed that any transgender clients were "Male to Female"** (code 3) (ARIES gender codes are more specific than CAREWare or Carebase). After conversion, when working in a transgendered client's record, double check their gender status in case they should have been coded as "Female to Male." | |
| You cannot update a client's data once a **date of death** is entered. ARIES will not capture data that is greater than the date of death. If you enter data that is less than the date of death, then ARIES will be able to capture that information. | |
| When entering the **"Hispanic"** data field, if a client self-identifies as "Hispanic," enter "Yes" in the "Hispanic" field and then select the appropriate "National Origin/Ethnicity" category. You must still enter a "Race" category in the "Race 1" field. If the client only identifies as being "Hispanic," select "Other" for the "Race 1" field. | |
| **Agency Specifics Sub tab** | |
| Agency Specifics contains a "**Client Alert" feature**. You can leave a message in the "Client Alert" notes field for others in your agency to see. If this field contains text, a yellow triangle with an exclamation point inside the triangle will appear next to the client's name across the top of the screen. If you click on the yellow triangle, a message will pop-up with the client alert message. This is available in most screens. | |
| **Regarding ARIES "Referral Source" data element if data conversion for CMP's Carebase, CSP's CAREWare and EIP's COMPIS** was completed: For providers who have more than one of the above systems being converted into ARIES, it is possible that a client being imported into ARIES might have already been enrolled in ARIES. In this case, the import data will overwrite the existing ARIES data. It is also possible that the imported data might not be as accurate as the former existing data in ARIES.<br><br>As part of the above data conversions, there will be a "conversion" value in the "Referral Source" field on the Demographics Tab/Agency Specifics Sub Tab. The conversion value will specify from what OA database the client was converted. OA will provide you with a report listing the clients whose data might have been overwritten during the conversion. Providers will want to verify the accuracy of the data for these clients. | |

## Eligibility Tab

| **Eligibility Sub tab** | |
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| **If you hit "New" accidentally, do not hit "Save"** or you will save a new record with the default of "Proof of Residency" in the "Type" field. If you accidentally hit "New" and you want to get rid of the new row, hit "Cancel." This will delete the new record. | |
| **Financial Sub tab** | |
| The poverty level guidelines encompass the **Federal Poverty Level** which ARIES will calculate for you. The Federal Poverty Level calculations are updated by OA on an annual basis. However, OA will not update the guidelines until ***AFTER*** the CADR is run, i.e. after March 15th. | |
| When **entering monetary fields, do not enter the dollar sign**. However, when **entering dates, phone, or social security number you must enter forward slashes "/" or hyphens "–"** | |
| If you enter "Yes" to **"Do You Have Other Assets?"** then ARIES requires the user to enter a dollar amount. | |

## Program Tab

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| On the Program Summary read-only sub tab, **the assigned staff** does not match, nor are they connected between the summary sub tab and specific program sub tabs. It is confusing because it appears as though the staff on the summary and program-specific sub tabs is connected, but they are not. Staff assigned on the individual program read-only screens is assigned to the client within that specific program. | |
| **The program read-only screen sub tab** is purely "read-only." It provides program enrollment status for all OA programs in which the particular client is enrolled. To change program enrollment status (disenroll, re-enroll, etc.) for a specific program go to the specific OA program sub tab to add/update the necessary information. | |

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| When updating a **client's enrollment status in the various Program sub tabs**, you can only edit the last, most recent record entered on the particular Program sub tab. You can no longer edit the record once it moves down the table; in other words, once a new enrollment status record is added and saved, you can no longer edit old entries. | |

## Medical Tab

| **Medical Sub Tab** | |
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| When entering the data field, "**Number of Risk Partners Notified by the Health Department,"** you must first enter the risk partner number and then enter a date in the corresponding date field. This is a CADR question; if the date entered in the field falls within the reporting period, it will be counted in the CADR. | |
| There are 4 data fields that can collect various **acuity tool scores and the dates** of the acuity score assessments. If your agency uses online acuity tools, your agency can designate one or more of these fields to collect your clients' scores and score dates. Also, ARIES has the ability to store the link to your acuity tool. Call the ARIES Help Desk for more information. | |
| **Medical History Sub Tab** | |
| Regarding the field **"TB test medically indicated,"** many physicians require that clients be routinely tested on a yearly basis as part of their HIV care. If an agency routinely tests clients for TB, at some point during the year, the agency needs to make sure that the "Yes" answer option is selected. You must also enter a date field. This is so the client will be counted in the CADR.<br><br>Some counties, however, may not routinely test for TB. Some physicians may screen using a standard screening tool consisting of a series of questions. If the answer to all the questions are negative (meaning they did not report any symptoms) nor did they exhibit any symptoms (based on a clinical assessment) then they do not receive a test. In this situation, you would answer "No" to the medically indicated questions since you would not be planning to do a test (PPD or CXR). | |

| **OB/GYN & Pregnancy Sub Tab** | |
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| If using "Save and Next" to navigate through ARIES ***AND*** if the client is not a "Male" or "Male to Female Transgender," ARIES will prompt the user with the following message "Click OK to enter the OB/GYN and Pregnancy data now; otherwise you will go into medications." **If a client is "Male" or "Male to Female Transgender," ARIES will skip the OB/GYN tab** when using "Save and Next" to navigate through ARIES. | |
| On the **OB/GYN and Pregnancy history edit screen, you can collect anal pap smears in the "Pap Smear" data field**, even if the client is a "Male" or "Male to Female Transgender." If you need to enter a pap smear for a male/male to female transgender client, you must manually click on the OB/GYN and Pregnancy sub tab to enter the necessary data. | |
| On the OB/GYN and Pregnancy history edit screen, **one vertical row of data represents one pregnancy**. | |
| **ART Medications Sub Tab** | |
| If you select "None/NA" or if you select "Unknown/Unreported" for **"ART Type,"** you still need to put the current date (or the date the data was collected) in the "Start Date" field. This is a CADR required field; the date you enter determines if the response will be included on the CADR. | |

## Risk and Assessments

| **Risk Factors Sub Tab** | |
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| Fill out the column on the right hand side **"Heterosexual Contact Only"** if you are prompted with a message that specifies, "You have checked a risk factor that indicates the client engaged in heterosexual contact. Heterosexual contact is not a CDC-defined HIV risk factor unless the client's heterosexual partner was at-risk or known to be infected. If the client's heterosexual partner was at-risk or known to be infected, please also select the appropriate heterosexual contact risk factor from the column on the right side of the screen." | |

# Care Plan Tab

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| **Needs Assessment Sub Tab** | |
| If you create a "Needs Assessment," ARIES will **automatically create a Care Plan** for each need where you have checked the "Create Care Plan" box. . | |
| **Care Plan Sub Tab** | |
| The items first displayed on the read-only screen (with the most recent first) are the **"open" Care Plans**, i.e. plans you can still edit. After that, the completed care plans are listed with the most recent listed at the top. | |
| On the Care Plan edit screen, there are two fields that are required to complete a Care Plan; they are "**Outcome" and "Date Completed."** Regardless of the "Outcome" answer option you select, once you enter the "Date Completed" field, you can no longer edit the Care Plan record. **DO NOT ENTER** the "Date Completed" field until you are ready to close out the Care Plan. | |
| **You can only edit your Care Plan** and not a Care Plan created by another agency even if the client is a shared client. | |
| **Referrals Sub Tab** | |
| If given the proper permission level, you can look up which agencies/providers are in your network. This is done through the **"Agency Search" screen**. This may help you decide which provider to choose when making a referral. | |
| **Under "Reports," "Client Reports",** you can run a report to see the agencies for which you have referred your clients. You can also go to the agency page and, if it was entered, you can see the agency e-mail. You can then e-mail the agency to let them know you are sending a referral. | |

## Case Notes Tab

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| Case notes have different **permission levels**.  Users may be given permission to create and edit case notes but they may not have permission to **sign and seal the case notes**. | |
| If a client is a share-client, there are **several types of case notes that are *not* shared**.  These are: Incident report, legal, mental health, and substance use.  Users within an agency can only see these types of notes if they were assigned the proper permission level.  Other agencies will not be able to see these case notes, even for shared clients.<br><br>Also, there is a check box on the “Case Notes” screen that you can check if you do not want to share additional types of case notes. | |
| **Other agencies cannot view case notes on shared clients until** they are signed and sealed with the exception of fields automatically blocked from sharing. | |
| There is no expiration on the **“Sign and Seal” feature**; the note stays in ARIES for an unlimited amount of time. | |
| If you have the appropriate permission level and want to **edit a “Signed and Sealed” note**, you can click “Edit” and simply add a new note to the existing note.  You just add a new paragraph explaining to disregard a note that had been “Signed and Sealed.” | |
| The items on this read-only screen are listed by **“Activity Date”** (the date the note was recorded or updated).  The most recent activity date record is on the top.  The records are **NOT** listed by the date the note was entered in the system (system date). | |

## Services Tab

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| A program will not display in the **program drop down field** unless a contract exists for that program and the date range of the contract covers the service date you entered. | |
| **Primary and secondary services** are defined by the Health Resources and Services Administration (HRSA) and the Office of AIDS (OA).  **Agency subservices** are defined by the providers.  This can be done in the contract set-up if you have the necessary permissions. | |

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| **The primary service determines the secondary service list. The secondary service determines the sub-service menu**. For example, if you change the secondary service the sub-service list is automatically changed. | |
| **The default units of service (UOS) for most service categories are “15 minutes.”** However, some service categories have different units of measurement such as, “test,” “visit,” etc. Because the “Other Services” categories are a mixture of diverse services, the units of measurements are varied. | |
| ARIES will calculate the **total cost for price** and unit of service. | |
| On the service page, California does not need to enter in **CARE/HIPP Co-Payments** even though it is a required field. | |
| Some services, such as transportation, have a **“Service End Date”** field attached to them. By selecting this field, you can make the “Service End Date” a certain number of days later and hit “Save” and ARIES will enter one service for each day within the date range. For example, if you make “Service End Date” five days later, ARIES will then enter five service records for you. However, you will not see the “End Service Date” field on the screen until you select the specific service. In other words, not all service categories in ARIES will have this “Service End Date” field option. Also, when using this feature, the services must occur on consecutive days; the services cannot skip days. This feature assists with batch service data entry. | |
| If you attempt to enter a duplicate service (same client, date, contract, program, primary service, secondary service and subservice), ARIES will display a warning message. To save the duplicate service, you must check the “Create Duplicate Service Records” box and click “Save & Done” or “Save & Another.” | |
| After you select “New” and enter service information, you can enter the exact information (same contract and service information) for a different date by changing the date first and then hit **“Save and Another.” This feature assists with batch service data entry.** | |
| **From the read-only screen, if you hit the “Edit” button** on a service, it will truly edit the service i.e., it will write over the “old” service. | |

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| If you enter ARIES and go directly to the Service screen (by clicking on Shortcuts), **you cannot do batch data entry from the Service Line Item Screen if you have two clients with the same name**. You have to go back to the client search screen to ensure you are entering data for the correct client. | |
| I**f you enter a service from outside the client record** (if you click on shortcut to go to the service line item screen), you have to remember to type in the client's name (you can also change the drop down box to specify Agency Client ID or Program Client ID). If you choose to use **Client Name**, you must enter in first name first and then last name. This is confusing because the staff name in the box directly underneath shows last name first. Note that it is best to enter services by going into the client record first and then click on the service tab. | |
| You can also **enter the services from the Care Plan**. If you enter the services from the Care Plan, the service is listed under Care Plan AND on the Service Read-only. However, if you enter services from the Service Line Item Screen, it will not automatically populate the Care Plan. It is not a reciprocal relationship. | |

## Reports:

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| In the *Client* ***Reports* menu, *Referral Report*,** the box in the second column does NOT correspond with the 1st column heading. Rather, it is associated with the next row of boxes for entering dates and/or date ranges. | |
| **Crosstab reports:** you can only run reports on clients in your specific agency. | |
| Running reports puts a lot of demand on the main ARIES database. Therefore, to prevent slowing down the main ARIES system, all reports come from a separate Reports database, which is a copy of the main ARIES database. **We use a feature called "replication," which copies every change in the main ARIES database over to the Reports ARIES database.** So if you enter data in ARIES and then immediately try to run a report on this data, you may not be able to instantly capture your new data in a report. You will have to wait for the data you just entered to traverse over to the Reports database. In sum, you might experience minor delays in reporting. | |

# Administrator Training Tips & Helpful Hints:

| **Funding Sources and Contracts** | |
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| **All agencies will use the same contract names for their contracts.** This standardized information will come from OA. Also, contracts names are associated with a start date and an end date. | |
| When setting **up a contract**, only check the boxes for the contract you are setting up. If this is done wrong, two programs will show up on the program drop down when only one program should appear. For example, if you are setting up an CMP contract, ***only*** check the CMP services and not HOPWA services. Note that there are exceptions to this rule for EIP contracts. | |
| **While you can customize the names of contracts or funding sources, the programs and primary and secondary services are pre-set.** If you need to set up contracts for programs that are not listed, select primary and secondary services from the Ryan White program that are the closest to your contract's services. This insures that the services will be marked as Ryan White eligible and included in the CADR. | |
| **OA has standardized all units of service**. For example, the standard unit of measurement for face-to-face case management is 15 minutes. If an agency determines that their face-to-face case management visits are 45 minutes, they can change their default to 3 units of service, which would be 3 units at 15 minutes each = 45 minutes total. | |
| **The Referral screen will be pre-filled from the Care Plan's Referral Section**. This only works if the service-type entries on the Care Plan and Referral tabs are identical. In other words, the drop down entries in the Care Plan ("Need") must exactly match the drop down entries in the primary service variable on the referral screen. If the drop down selections are not identical, please call the OA ARIES Administrator. This has to do with the set up of services under Funding Sources and Contracts. | |
| **Staff Permission Levels** | |
| When establishing **permission levels for users**, be aware that the column/row/general headings (permission options and user group title) are not visible when you scroll down the page. | |

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| Case notes have different permission levels. Users may be given permission to create and edit case notes but not have permission to **sign and seal the case notes**. A password is required to sign and seal a case note. | |
| In the **staff permissions screen**, there are several lines of permissions for Case Notes. These determine whether users can view, change or create various types of notes (legal, mental health, etc.). The last line under Case Notes is “Sign and Seal” and it has only two active checkboxes: “View” and “Change.” The “View” permission determines whether you can “Sign and Seal” a note (basically, it determines whether you can view the box (enter a password in the password field) and button for Sign and Seal. The “Change” permission determines whether you can edit a note even AFTER it has been “Signed and Sealed.” | |
| **Only agency administrators, AA Administrators and Partner Administrators should be able to “Change” Signed and Sealed case notes**. Administrators should ***NOT*** give the “Change” permission to their regular users. | |
| **Miscellaneous** | |
| Agencies that join the OA installation of ARIES cannot customize the drop **down lists**. However, you can give your suggestions for drop down list changes to the ARIES Help Desk. If you are a Title I agency who has joined the OA installation of ARIES, you can voice your suggestions as a member of the Governance Committee. | |
| There is a historical database with **longitudinal variables** in ARIES which was developed for auditing purposes. Only OA has access to the history database. In situations where there is a compelling reason to do so, OA can determine who entered data or changed information. | |
| **Do not delete staff out of ARIES when staff leave an agency**. The administrator should simply delete staff passwords so the user cannot access ARIES anymore. Username is attached to client records in ARIES and other users need to be able to access/edit past users’ records. | |